

I Introduction

The CALSTARS reporting system provides agencies the capability to retrieve information using various methods. Information can be obtained as electronic data files or as reports. CALSTARS reports are either system generated or can be requested in several different types of media, including paper, and electronic report files.

This volume discusses the various types of reports, the report media available, how reports are accessed, how reports can be stored for long periods of time, how reports are printed, and which options are available for each report to tailor the report to the agency's needs. The majority of this volume, Chapter III, discusses and provides an illustration of each of the CALSTARS Standard reports.

This chapter discusses the types of data and reports available and gives an overview of the reporting process.

TYPES OF DATA AND REPORTS

CALSTARS reports and data files are either generated at the request of an agency or are automatically produced by various CALSTARS processes. The various types of data and reports are briefly discussed below and are discussed in detail in the following chapters.

Standard reports

Reports that can be requested by agencies are referred to as standard reports. The CALSTARS standard reports are intended to meet the reporting needs of most agencies. There is great flexibility in requesting reports. Each agency may select the specific reports to be produced on a daily or periodic basis. In addition, an agency may choose from several options that control the print media, the print destination, the structure and content. Chapter II-A in this volume discusses how to request these reports. Chapter II-B discusses how to print these reports.

Standard reports can be requested from the Request Standard Reports screen (Command **G.3**) or the List of Report Groups screen (Command **G.5**). The two types of standard reports are described below:

- ☛ Same day reports - are produced using the master files from the previous overnight master file update. A same day report is created the day the report is requested, but does not include transactions entered that day. The term 'same day' indicates that the report is created the same day (before the next nightly process). For example, a same day report requested on Thursday would be received on Thursday.

- ✧ Overnight reports - are produced after all table and accounting transactions have been processed. For example, an overnight report requested on Thursday would not be received until Friday.

System Generated Reports

System generated reports are produced automatically when an automated CALSTARS process occurs, when data is received and processed from a source outside of CALSTARS, or when data is uploaded to CALSTARS (external batches, tables or timesheets). For example, prior to the beginning of each processing day, each agency automatically receives reports showing detailed transactions and transaction counts of the previous night's processing. In addition, there are other generated reports from the claim schedule, labor distribution, cost allocation and year-end processes. For more information, refer to Chapter II-D, System Generated Reports, in this volume.

Data Files

Agencies can obtain data files for the following items:

- ✧ Standard Reports – can be requested through Command **G.3** as a data file by keying a **D** or **F** in the Output Destination field on the Report Selection Options screen.
- ✧ System Generated –can be requested as data files by sending an e-mail to CALSTARS.
- ✧ CALSTARS Table/File Copy - Agencies can directly access their raw data in the CALSTARS tables and master files through Commands **G.1** (tables) and **G.2** (files). Using their own software products, these table and data files may be down-loaded locally for reports and interrogations, as needed.

Refer to Chapter II-C, Data Files, for a complete discussion of the process.

OVERVIEW OF THE REPORTING PROCESS

Refer to the flowchart below in Exhibit I-1 for a general overview of the reporting process.

